Sterling Field Sales

Release Notes

Release 9.0

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Sterling Commerce

An IBM Company

Contents

New Features

Sterling Field Sales provides a seller with the capability to create a sales opportunity for a customer, and to present one or more quotes to the customer for a potential sale. For example, a Field Sales Representative of ABC Corporation may see an opportunity to sell computers to a customer, XYZ Corporation. In such a scenario, the Field Sales Representative may present the following quotes to XYZ Corporation:

- Quote A: Buy two laptop computers and receive a 5% discount off the list price.
- Quote B: Buy one laptop computer and one desktop computer and receive a 6% discount off the list price.
- Quote C: Buy two desktop computers and receive a 7% discount off the list price.

Based on these quotes, ABC Corporation and XYZ Corporation can negotiate and arrive at a mutually agreeable quote that can be one of the three presented. After one of the quotes is accepted by XYZ Corporation, the Field Sales Representative can convert the quote to an order.

Opportunity Management

An opportunity acts as a container for holding a quote or related alternative quotes that can be presented to a customer. As part of opportunity management, Sterling Field Sales enables you to create an opportunity for a customer, search for opportunities based on certain criteria, and modify the details of an opportunity.

You can create an opportunity for either an existing business or consumer customer or a new business or consumer customer. An opportunity consists of header information and customer information. Information captured in an opportunity includes, for example, the name of the opportunity, the lead from which the opportunity originated, the owner of the opportunity, customer information, and so on.

When you create an opportunity, you can assign it to an owner and a co-owner. An owner is the user who has been assigned as the primary owner of the opportunity. A co-owner, on the other hand, is the secondary owner of the opportunity. You can also specify the origin of the lead when you create the opportunity. For example, a you can specify the origin of the lead as Trade Show, Call Center, and so on. In addition, you can add notes to the opportunity.

An opportunity moves through the following statuses in its life cycle:

- Inquiry – An opportunity is in this status after it is created. To create an opportunity, it is mandatory that you provide the details of the customer for whom you are creating the opportunity.
- Negotiation – An opportunity moves to this status when a quote is created for that opportunity.
- Won – An opportunity moves to this status when an order is created from any quote associated with the opportunity.
- Lost – You can mark an opportunity as **Lost** if the opportunity no longer serves the necessary purpose.

Quote Management

A quote is a commercial document that is created and presented to a customer to view a predetermined set of products, their quantity, predetermined price, price adjustments, and delivery date. A quote is always

associated with an opportunity. As part of quote management, Sterling Field Sales enables you to create a quote, search for quotes based on certain criteria, and modify the details of a quote.

The quote life cycle begins with the creation of the quote, and ends when the quote is converted to an order or the quote is abandoned.

You can create a quote for an existing opportunity or directly without an opportunity in context. When you create a quote without a pre-existing opportunity, the opportunity is automatically created for that quote.

You can create and present one or more alternative quotes to a customer for an opportunity. Irrespective of the number of quotes in an opportunity, only one can be accepted by a customer. At any point of time throughout the quote's life cycle, you can add notes to the quote. For example, when you abandon a quote, you can add notes, explaining the reasons behind abandoning the quote.

Following describes the life cycle of a quote:

1. A Field Sales Representative creates a quote either for an existing opportunity or without an opportunity in context by entering information about the items, their price adjustments, and payment terms and shipment terms.

2. A quote may require one or more approvals before being presented to the customer. For example, if a Field Sales Representative offers a discount that exceeds the amount the Field Sales Representative is allowed to offer, a supervisor may be required to approve the quote. In a more complex scenario, multiple people and multiple departments may have to approve the quote.

    If approvals are required for a quote, the quote is kept on hold until all the approvers approve the quote. A quote cannot be presented to a customer until it is approved by all the approvers. If approvals are not required, the quote is automatically moved to the **Approved** status.

3. The Field Sales Representative presents the quote to the customer after all the products in the quote have been validated and all the required approvals, if any, have been obtained.

4. The customer can either accept or reject the quote.

    - If the customer accepts the quote, an order is created from the quote, either automatically or by the Field Sales Representative. The quote is moved to the **Ordered** status and all the alternative quotes are moved to the **Abandoned** status.

    - If the customer rejects the quote, the Field Sales Representative may rework the quote and present the reworked quote to the customer. If the customer does not want to negotiate on the quote anymore, the customer may request that the quote be abandoned. In such a situation, the Field Sales Representative can abandon the quote.

Known Issues

This topic describes the known issues that you may encounter when using Sterling Field Sales, Release 9.0.

Opportunity Management

You may encounter the following issues when managing the Opportunity module in Sterling Field Sales:

- **213381** – The screen flickers when you perform the following tasks:
  - Click the **New Opportunity** hyperlink in one of the home pages to navigate to the Create Opportunity screen.
  - Click **Save** in the Create Opportunity screen to navigate to the Opportunity Details screen.

  Solution/Workaround: None.

Quote Management

You may encounter the following issues when managing the Quote module in Sterling Field Sales:

- **210560** – In Mozilla Firefox, the focus is not set to the **Credit Card No** field when you perform the following steps:
  a. Navigate to the Convert to Order screen.
  b. Under the **Payment Methods** panel, click **Add**.
  c. In the Payment Method dialog box, from the **Payment Type** drop-down list, select Credit Card.
  d. From the **Credit Card Type** drop-down list, select the credit card type.
  e. In the **Name On Card** field, enter the name of the card holder as displayed on the credit card, and then press **TAB**.

  The focus is not set to the **Credit Card No** field. The focus is set to the IFrame containing the **Credit Card No** field and not the field itself.

  Solution/Workaround: Use the mouse to set the focus to the **Credit Card No** field.

- **213182** – When viewing the adjustment breakdown of a bundle item, the adjustments applied to the components may be displayed incorrectly if there are any charges applied to the components that are not derived from manual pricing rules.

  Solution/Workaround: None.

- **214966** – If a quote requires approval from multiple approvers and is placed on hold after it is rejected by one of the approvers, the quote is still displayed in the **Quotes Pending My Approval** dashlet on the home page of the other approvers who are next in the approval hierarchy.

  Solution/Workaround: None.

- **215276** – If you modify the short description of an attribute in Business Center, the modifications are not reflected under the **Narrow By** panel of the Product Search screen and the **Specifications** tab of the Product Details screen.

  Solution/Workaround: None.

- **215391** – Under the **Variation Products** tab in the Product Details screen, the sequence in which the attribute values are displayed is not the same as displayed in the Business Center application.

  Solution/Workaround: None.

- **216201** – You may encounter the following issues when you click **Save** in the Create Opportunity screen or Create Quote screen:
  - In Microsoft Internet Explorer, the success message is partially displayed.
  - In Mozilla Firefox, the success message is not displayed.

  Solution/Workaround: None.

- **216214** – When you attempt to create a quote, the **Enterprise** drop-down list in the Select Enterprise dialog box displays even those enterprises that do not have the role of Seller.

  Solution/Workaround: None.

- **216547** – If the ARIALUNI.TTF font is not installed on the application server, you cannot generate a proposal using the JasperReport reports provided out of the box.

  Solution/Workaround: Install the ARIALUNI.TTF font.

- **216853** – When you change the customer contact in the Quote Details screen, the Billing Address and the Shipping Address of the new contact are not saved on the quote.

  Solution/Workaround: None.

Localization

You may encounter the following issues when localizing the application:

- **212748** – If you localize the short description of a product in the Business Center application, under the **Product** column of the quote screens, the localized short description is not displayed.

  Solution/Workaround: None.

Documentation

You may encounter the following issues when using the Documentation:

- **211162** – When you access the online help in Mozilla Firefox, bullets may be displayed as alphabets.

  Solution/Workaround: None.

- **215840** – When you access the context-sensitive help pertaining to a screen, the dialog box that displays the help is titled Sterling Call Center and Sterling Store Online Help until the help content is displayed. This issue occurs only if Sterling Call Center and Sterling Store are also deployed along with Sterling Field Sales.

  Solution/Workaround: None.

Miscellaneous

You may encounter the following issues when using the Sterling Field Sales application:

- **209846** – When an error message or success message is displayed in a dialog box, scroll bars are displayed.

  Solution/Workaround: None.

- **210659** – Navigate to the Convert to Order screen. Under the **Payment Methods** panel, click **Add**. In the Payment Method dialog box, enter the mandatory information, and click **Confirm**. The Payment Method dialog box may not close though the payment method is added to the quote.

  In addition, when you click **Close** in the Payment Method dialog box, the box that displays the amount to be charged to the payment method is not editable.

  Solution/Workaround: Log out of the application, and then log in to the application again to modify the amount to be charged to the payment method.

- **212667** – When you add a new address for a customer in the Quote Details screen, you cannot make this address the default Bill To address, default Ship To address, or default Sold To address using Sterling Call Center and Sterling Store.

  Solution/Workaround: None.

- **213242** – Sterling Field Sales does not support the thousands separator for numerical fields.

  Solution/Workaround: None.

- **213627** – If you search for a business customer that is created in Sterling Call Center and Sterling Store, the customer will not be returned in the search results if you search using the following customer information as the search criteria:
  - Postal Code
  - E-mail
  - Day Phone

  Additionally, if you add a new business customer contact in Sterling Field Sales, the customer will not be returned in the search results if you search for the customer using the following contact information of the new business customer contact as the search criteria:
  - Postal Code
  - E-mail
  - Day Phone

  Solution/Workaround: None.

- **214121** – In Microsoft Internet Explorer, the screens may load slower than they do in Mozilla Firefox.

  Solution/Workaround: None.

- **214237** – The Sterling Field Sales WAR package cannot be deployed with the Sterling Web WAR package in a single EAR package.

  Solution/Workaround: Deploy the Sterling Field Sales WAR package and the Sterling Web WAR package in different EAR packages.

- **215111** – After you add a note in the Notes dialog box, if you close the dialog box by clicking the X icon, the note that you added is not displayed in the **Notes** panel of the Opportunity Details screen, Quote Summary screen, and Approvals screen. However, if you close the dialog box by clicking the **Close** button, the note that you added is displayed in the **Notes** panel.

  Solution/Workaround: None.

- **215547** – If the application is deployed on the JBoss server in HTTPS mode, a session timeout error is thrown when you log in to the application for the first time.

  Solution/Workaround: None.

- **216122** – If there are no notes previously added manually to an opportunity or a quote, the system-generated notes are not displayed in the Notes dialog box when you perform the following steps:

  a. In the **Note Text** box in the Notes dialog box, enter the note text.

  b. Click **Add Note**.

  c. Select the **Show System Generated Notes** check box.

  The system-generated notes that have been logged on the opportunity or quote are not displayed.

  Solution/Workaround: To view the system-generated notes, perform the following steps:

  a. Close the Notes dialog box by clicking the **Close** button.

  b. Reopen the Notes dialog box by clicking the **View/Add Notes** hyperlink.

- **216211** – When a quote is in the **Ordered** status, the **View/Add Notes** hyperlink in the top panel of the quote management screens may not be displayed completely.

  Solution/Workaround: None.

- **216332** – In the Opportunity Search screen, if you search for an opportunity by selecting **greater than** as the query type for the **Anticipated Close Date** field, the search returns even those opportunities whose anticipated close date is equal to the date that you enter.

  A similar issue occurs when you search for a quote using the **Expiration Date** field in the Quote Search screen.

  Solution/Workaround: None.